



CHAPTER V

The Campaign Plan: *Your Road Map to Success*

THE CAMPAIGN PLAN: YOUR ROAD MAP TO SUCCESS

The first and most important step in launching a successful campaign is writing your campaign plan. The plan is a detailed, comprehensive and informed outline of your entire campaign operation that takes you from the announcement of your candidacy to your victory on Election Day. You will not succeed without one.

Why plan? Without a written outline of your objectives and a detailed plan to get there, you are very likely to lose focus, become sidetracked by crises and spend your time performing non-essential tasks better suited to your staff. In addition, you have no official means to measure your success and make necessary adjustments throughout the course of the campaign – a mistake that can spell disaster for any aspiring candidate.

There are no shortcuts to developing a plan. You should allow and devote ample time to quantify your resources, assess your needs and make important decisions about all aspects of your campaign, including targeting, message, voter contact, scheduling, staffing, budgeting and fundraising. Above all, it is imperative that you remember the cardinal rule of campaigning: If you fail to plan, you are planning to fail.

Following is a list of the components that should be included in your plan; a sample outline is included at the end of this chapter.

I. ELECTORAL ENVIRONMENT & POLITICAL LANDSCAPE

As outlined in Chapter IV, you should have a clear understanding of the geography and demography of your district, as well as the political environment in which you are running and that information should be laid out at the top of your plan.

Begin with a short summary. What are the geographic and demographic characteristics of your district? Is the population largely rural, urban, or a mix of both? Has there been a recent loss of local jobs? Where do your neighbors get the majority of their news and information?

Outline the political landscape, including information on voters and their historical voting behavior; issues that have had particular relevance or local importance in your district; and information on your opponent(s) and the other races expected to compete for airtime, money and volunteer support during the campaign. What percentage of people in your district are registered to vote and what is the Party split? What was the margin of victory for the incumbent holding the office you now seek? Will there be any referenda on the ballot?

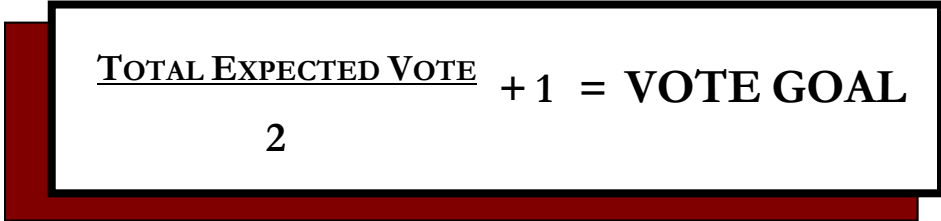
II. TARGETING

Once you become familiar with the political math of your district, you will use this information to answer the most important question of your campaign: How many votes do you need to win?

In order to determine this figure – which is your campaign’s *vote goal* – you need to begin by estimating the *total expected vote* for your race. This is accomplished by multiplying the *turnout percentage* from the last election for this seat by the *number of currently registered voters* in your district.

$$(\text{Recent Turnout \%}) (\text{Current Registration}) = \text{Total Expected Vote}$$

Once you have determined the *total expected vote*, determining your vote goal in a two-person race is easy: simply divide your total expected vote by two and add one.


$$\frac{\text{TOTAL EXPECTED VOTE}}{2} + 1 = \text{VOTE GOAL}$$

Once you have determined your *vote goal*, you will begin the process of *targeting*, or finding the “base” voters most likely to support you and to vote on Election Day; the “swing” voters you will persuade with your message; and your opponent’s base voters, whom you should waste no time or resources to contact.

Of critical importance to your targeting will be the *voter file* – the record of the voters in your district, their Party affiliation and their history of turnout. Your state party will be able to tell you how and where the voter file can be obtained.

The importance of targeting simply cannot be overstated. An effective targeting strategy will allow you to spend your campaign's most limited resources, namely time and money, in the most efficient way possible – reaching only those voters you have a chance of winning, rather than wasting time and money on those who are unlikely to turnout and/or unlikely to vote for you if they do.

In your plan, you will include the total expected vote in your district and your ultimate vote goal; you will also include other important targeting data such as party performance, high and low performing precincts and persuasion percent, formulas for which will be outlined in detail in Chapter VI. This data will ultimately provide the foundation on which your entire voter contact strategy – and your victory – will be built.



"Targeting your universe of voters is one of the most critical things you will do in your campaign plan. I would not have won my congressional primary without the targeting strategy we developed and executed."

– Congresswoman Tammy Baldwin (WI-02)

PLAN-WRITING TIPS

- ◆ **Seek Advice.** Before you begin, talk with those who have been there before, such as party officials, the Caucus, former elected officials and consultants. Their experience can help you avoid costly mistakes.

- ◆ **There's No I in 'Team'.** Writing the campaign plan is not a job for the candidate alone, even if you do not yet have paid staff. Hold a series of organized, goal-oriented planning sessions with your 'kitchen cabinet' – trusted and knowledgeable individuals such as your spouse, staff, consultants and trusted progressive leaders and political insiders – to map out the plan.

- ◆ **Start with Your Timeline.** Using large wall calendars to facilitate group participation, add all key dates, such as the filing deadline and primary election. Overlay with important events, such as family birthdays, holidays, the first day of school and the County Fair. Finally, work backward from Election Day to plot your hiring, fundraising, voter contact and media benchmarks. This timeline will serve as the foundation upon which your plan is constructed.

- ◆ **Break it Down.** Each component of your plan should be dealt with separately, either by the full group or by subsets of your team. Approach the areas of voter contact, fundraising, message development, and earned and paid media separately, then combine and overlay to complete the entire plan.

- ◆ **Keep it Consistent.** Make sure strategies in *each area* of your plan support other areas as well as your overall goals. Avoid any activity that does not directly support your ultimate goal of getting to 50+1. There are no resources to waste!

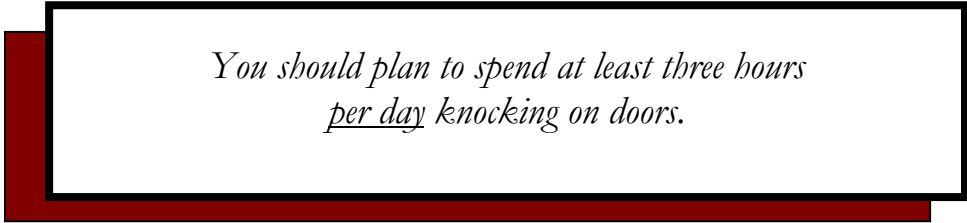
- ◆ **Stick to It!** The plan is your most important campaign tool. Use it to keep you focused, guide your use of time and money and keep you on track in case of the inevitable bumps in the road.

III. VOTER CONTACT

Voter contact, or the means by which you will make direct contact with your target audience, occurs in three primary ways: Door-to door visits by the candidate and volunteers; direct mail; and phone calls from volunteers or a paid phone bank. As a rule, the most effective voter contact is always that which allows the candidate to reach voters in the most personal – and interactive – way possible.

You will not be able to reach every voter in your district, so it is imperative that you design a strategy to reach those voters most likely to vote – and most likely to vote for you – as often and with as much personal and interactive contact as possible. Your campaign plan should identify your targeted universe of voters; outline the total number and type of contacts you will make with those voters over the course of the campaign (including phone calls, door-to-door contact and mail); and lay out a contact timeline.

An emphasis on direct voter contact should be the driving force behind your plan, your schedule and your campaign budget. Strategies for effective voter contact and information on new advances in voter file and voter targeting technology will be outlined in Chapter VI.



*You should plan to spend at least three hours
per day knocking on doors.*

IV. GOTV

Unless you can translate your support into votes you will not win, no matter how much money you raise, how compelling your message, how slick your direct mail or how large your army of volunteers. Get-out-the-vote (GOTV) efforts are the activities specifically designed to make sure your supporters vote on Election Day and they must be outlined in your plan in detail.

How, when and to whom will you distribute absentee ballots? When will you set up and how will you staff and operate Election Day phone banks? Will you utilize auto-calls to motivate voters in the final week of the campaign and if so, whose voices will you utilize? How you will recruit, train and deploy volunteers to work the polls? Will your campaign provide rides to the polls? Will you develop an Election Day ‘flushing’ operation?

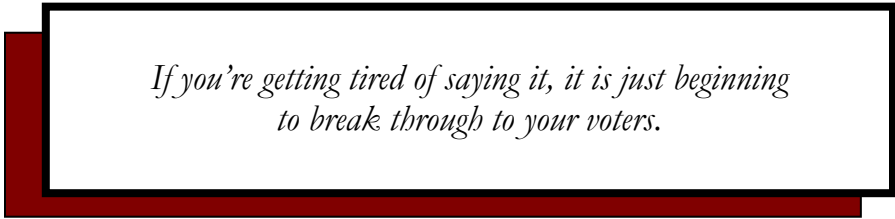
All of these elements should be outlined in your plan – and given the unquestionable importance of GOTV, devoting time and resources to this part of your plan is critical. For more on effective GOTV efforts, see Chapter VI.

V. MESSAGE

What message will guide your candidacy? Your message is the central guiding theme of your campaign – one that conveys the reason you are running, why you are the most qualified candidate and what you will do to improve the lives of those in your community once elected.

Your message should be relevant to the issues in your district, set you apart from your opponent, and make clear the values you stand for and what you will fight for once in office. Above all, it should be truthful, concise and conveyed repeatedly throughout all of your voter communication, including speeches, debates, campaign literature, media appearances and fundraising appeals.

Your message, along with a framework of your plans for testing it, disseminating it and using it in all aspects of your voter contact, earned media and fundraising efforts should be outlined in your campaign plan. In Chapter VIII, we will detail the process of developing a winning message and provide time-tested advice for effective delivery of that message to your voters.



If you're getting tired of saying it, it is just beginning to break through to your voters.

V. EARNED MEDIA

The earned media portion of your campaign plan will detail your efforts to generate press coverage of your campaign. It should include a list of the print, radio, television and specialty news media that cover your district and an outline of your plans to generate coverage through these outlets.

Thought should be given to the events that are natural draws for coverage, including the announcement of your candidacy, key endorsements and large local events. You should also include plans for surrogates to speak, write letters to the editor and call talk radio on your behalf; incorporate a system for rapid response; and devise an outreach plan specific to specialty news outlets that serve particular communities within your district. Chapter IX will detail tips for generating earned media.

VI. PAID MEDIA

While paid media is not the solution for every campaign, for some races it is a wise and very necessary investment of resources. Will your campaign invest in television, radio, or print advertising? If so when, where and with what frequency? As a general rule, you should not invest in paid media unless you can dominate the medium, or purchase enough to break through the clutter.

Your campaign plan should detail the print, radio and/or television outlets with which you plan to place ads and provide an estimate of the size and frequency of ads you plan to purchase. It should also detail selection and use of paid media consultants and identify target dates for consultant selection, ad production and time buying. For more on paid media, see Chapter VIII.

X. VISIBILITY

Visibility has numerous components and overlaps with several larger areas within your plan. From determining what events you will personally attend in the district and those at which your campaign should have a presence to deciding where you will conduct literature drops and how you will distribute bumper stickers and lawn signs, you should work visibility into all aspects of your plan and budget as we have done at the end of this chapter.

While regular presence at community events and widely distributed visibility materials can help augment a well-orchestrated campaign, they alone will not ensure your victory. As a rule, you should spend no more than 3-5% of your campaign budget on lawn signs, bumper stickers and other such materials. For more information on visibility, see Chapters VI, VIII, IX and X.

*Campaign Myth #1:
She who gives out the most yard signs wins!*

VII. RESEARCH

Conducting research on yourself, your opponent, key issues, and the mood of the electorate will help you identify your strengths and weaknesses as well as those of your opponent, prepare for potential attacks, develop your message and determine your strategy. Your campaign plan should include non-sensitive fact sheets on yourself and your opponent, a listing of resources for up-to-date issue information and an outline of your plans for using polling and/or focus groups. For more on research, see Chapter VII.

VIII. FUNDRAISING

How much money do you need to wage a winning campaign? How will you raise that money and when does it need to be in the door? As the candidate, you should set daily, weekly and monthly goals for your fundraising calls and plan to spend several hours a day on the phone raising money.

As outlined above, you should develop a system for culling lists of, contacting, tracking, following up with and thanking donors. Your plan should identify what tools you will use to raise money, such as a direct mail and events and set goals for each. It should also specify who will solicit each group of donors and include a timeline for solicitation and resolicitation throughout your campaign. Your overall campaign timeline should reflect your fundraising goals.

Your entire campaign plan will flow from the money you raise to sustain your voter contact, paid media and GOTV activities, so it is critical that your plan present a comprehensive yet *realistic* view of your fundraising potential. See Chapter VII for detailed tips on all forms of fundraising.

IX. CANDIDATE SCHEDULE

As the candidate, you should spend the vast majority of your time engaged in two activities: fundraising and direct voter contact. Your campaign plan should prioritize accordingly, serve as a guideline for your scheduler and set weekly benchmarks and goals for these activities.

Organize this section of your plan into several distinct time periods leading to the election and specify which type of activity should dominate each section. Include your personal and professional parameters, such weekly down time, family birthdays or business trips. Include information on the use of surrogate speakers or the candidate's spouse.

XII. STAFF AND VOLUNTEERS

What staff will you hire and how will you utilize volunteers? Assembling a team you trust and can depend upon to perform the most vital functions for your campaign is critical. As the candidate, you need to keep your time focused where it should be – on fundraising and direct voter contact. While not every campaign can afford to (or should) hire a full complement of staff, most candidates require the assistance of at least part-time staff, including but not limited to a campaign manager, a fundraiser and a field director for the final two months.

Your plan should outline the positions you will need to carry out in the plan, what the responsibilities of each include, whether they will be filled by paid or volunteer staff and the date the position must be filled. You should give thought to the day-to-day management and 'care and feeding' of volunteers, as they will provide your campaign with invaluable free labor. Finally, you should include an organizational flow chart, so lines of responsibility are clear. For more on hiring staff, see Chapter IX.

XIII. SYSTEMS DEVELOPMENT

There are a host of things that will happen on a recurring basis throughout your campaign that you will want your staff to systematize; responding to scheduling requests, tracking and acknowledging contributions, tracking voter

contact and vetting press releases are just a few examples. Each section of your plan should identify which activities will have formal systems for completion; your plan should also include a specific and separate section that outlines those systems in detail and can serve as a reference tool for your staff.

Throughout the remaining chapters, we will make recommendations for systems development within your field, press and fundraising operations specifically and for the management of your campaign as a whole.

XIV. TIMELINE

Working backward from the election, what is your timeline for meeting your goals? When will you hold key events and what monthly benchmarks will you set for yourself and the campaign?

Your timeline should include this information as well as key dates, such as the candidate filing deadline, when financial reports are due, and large visibility events in the district you will need to prepare for and attend. It should help guide your scheduling operation and should be used to regularly monitor the campaign's progress on all fronts.

XV. BUDGET

How much will it cost to win your race? How will that money be spent? Your plan is not complete until your budget is done.

Your budget should be a realistic, month-by-month forecast of the money you can raise and will need to spend in all areas of your campaign, including voter contact, earned media, paid media, visibility, research, technology, fundraising, staff, and overhead. As a general rule, you should plan to spend 75% of your budget on direct voter contact and paid media. For more on budgeting, see Chapter VII.

SAMPLE CAMPAIGN PLAN OUTLINE

PAGE 1

I. ELECTORAL ENVIRONMENT & POLITICAL LANDSCAPE

- ◆ District Geography & Demographics
- ◆ Current Political Representation & Last Margin(s) of Victory
- ◆ Key Local, Legislative, Statewide & Federal Races
- ◆ Voter Registration by Party & Voter Turnout in Recent Elections
- ◆ Historical Party Performance
- ◆ Salient Local Issues

II. TARGETING

- ◆ Brief Strategic Summary
- ◆ Total Expected Vote & Vote Goal
- ◆ Number & Description of Expected Base Voters / % of Vote Goal
- ◆ Number & Description of Expected Swing Voters / % of Vote Goal
- ◆ Opponent's Expected Base Voters
- ◆ District & Precinct-by-Precinct Party Performance
- ◆ Persuasion Percent, Persuasion Index & GOTV Index

III. VOTER CONTACT

- ◆ Brief Strategic Summary
- ◆ Door Knocking Universe Description & Number of Households
- ◆ Daily Door Knocking Goals
- ◆ Precinct Prioritization
- ◆ Candidate & Volunteer Walk Plan
- ◆ Direct Mail Universe, Planned Hits & Timeline
- ◆ Phone Bank Universe, Planned Hits & Timeline
- ◆ Literature Drops & Visibility

IV. GOTV

- ◆ Brief Strategic Summary
- ◆ Absentee Ballot Program/Strategy
- ◆ Vote by Mail
- ◆ Phone Banking
- ◆ Assistance from Outside Organizations
- ◆ Poll Workers
- ◆ Flushers
- ◆ Rides to the Polls

SAMPLE CAMPAIGN PLAN OUTLINE

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V. MESSAGE

- ◆ Brief Strategic Summary
- ◆ Overarching Campaign Message
- ◆ Position Statements on Salient Issues
- ◆ Plans for Polling/Message Testing
- ◆ Message Dissemination Strategies
- ◆ Stump Speech

VI. EARNED MEDIA

- ◆ Brief Strategic Summary
- ◆ List of Local Media Outlets & Key Reporters
- ◆ Planned Press & Visibility Events
- ◆ Outreach to Reporters, Editorial Boards & Specialty Press
- ◆ List of Surrogates & Surrogate Activities

VII. PAID MEDIA

- ◆ Brief Strategic Summary
- ◆ Outlets, Timing, Amount & Cost of Planned Media Buys
- ◆ Visibility Materials

VIII. RESEARCH

- ◆ Brief Strategic Summary
- ◆ Fact Sheets on Self & Opponent
- ◆ Plans for Use of Polling/Focus Groups

IX. FUNDRAISING

- ◆ Brief Strategic Summary
- ◆ Finance Committee
- ◆ Planned Fundraising Strategies
- ◆ Candidate Call, Event, Mail, Web, House Party, Individual & PAC Goals

X. BUDGET

- ◆ Voter Contact
- ◆ Earned Media
- ◆ Paid Media
- ◆ Fundraising
- ◆ Technology
- ◆ Visibility
- ◆ Research
- ◆ Staff
- ◆ Overhead

SAMPLE CAMPAIGN PLAN OUTLINE

PAGE 3

XI. CANDIDATE SCHEDULE

- ◆ Brief Strategic Summary
- ◆ Campaign Phases
- ◆ Goals for Daily Fundraising Calls & Door Knocking
- ◆ Personal & Professional Parameters
- ◆ Use of Spouse & Surrogates

XII. STAFF & VOLUNTEERS

- ◆ Brief Strategic Summary
- ◆ Positions, Job Descriptions & Hiring Timeline for Key Staff
- ◆ Recruitment & Utilization of Volunteers
- ◆ Organizational Flow Chart
- ◆ Volunteer Appreciation

XIII. SYSTEMS DEVELOPMENT

- ◆ Brief Strategic Summary
- ◆ Scheduling Systems
- ◆ Fundraising & Financial Systems
- ◆ Press & Vetting Systems
- ◆ Field Tracking Systems
- ◆ Volunteer Management Systems

XIV. TIMELINE

- ◆ Political Dates & Deadlines
- ◆ Dates & Events of Local Importance
- ◆ Holidays & Dates of Personal Interest
- ◆ Voter Contact, Fundraising & Media Benchmarks
- ◆ Proposed Media & Fundraising Event Dates